



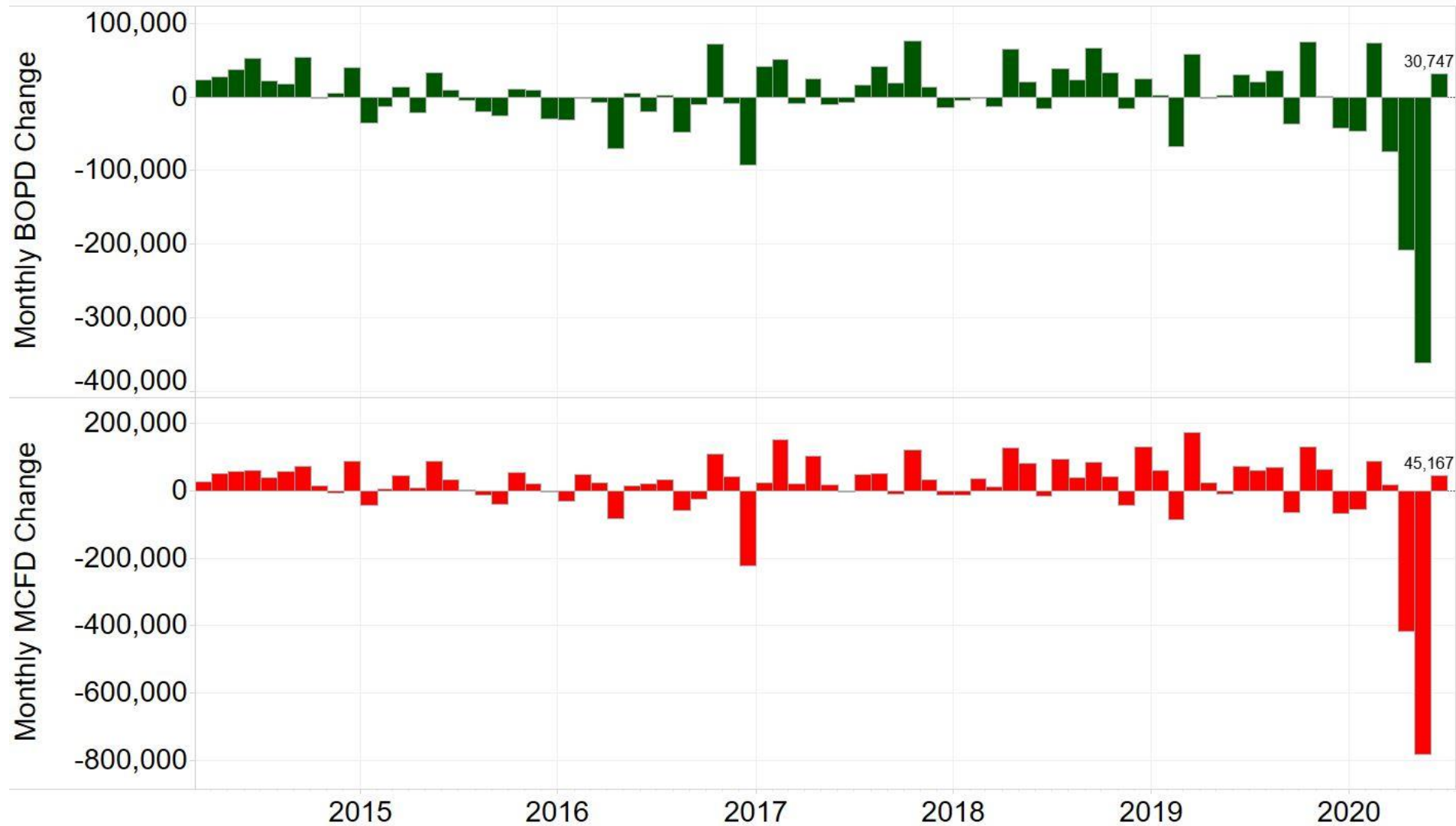
August 2020 Monthly Update
North Dakota Pipeline Authority
Justin J. Kringstad
August 14, 2020

US Williston Basin Oil Production - 2020

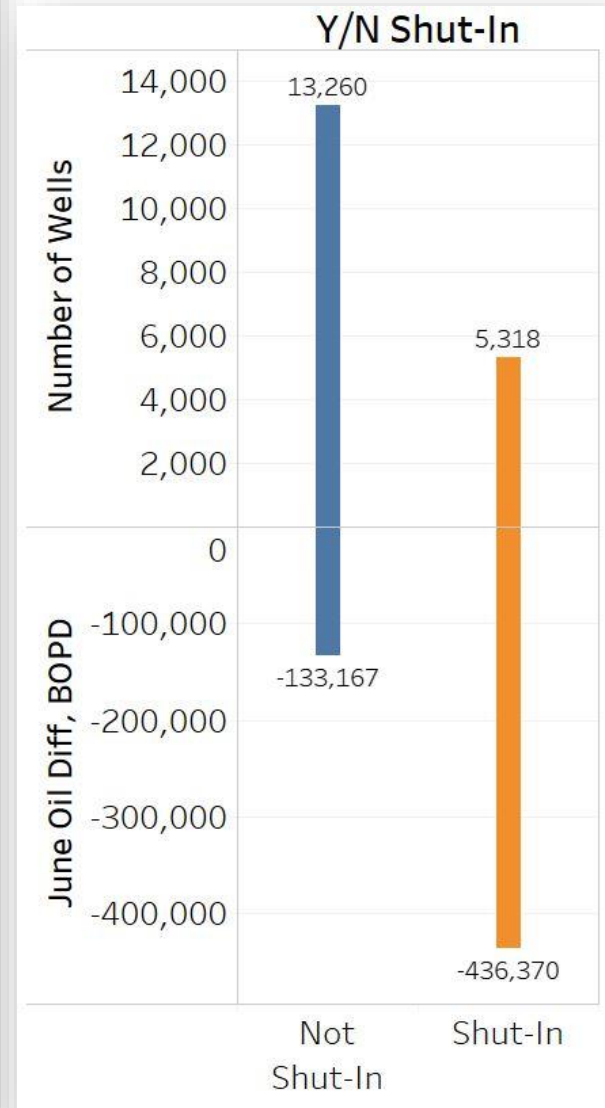
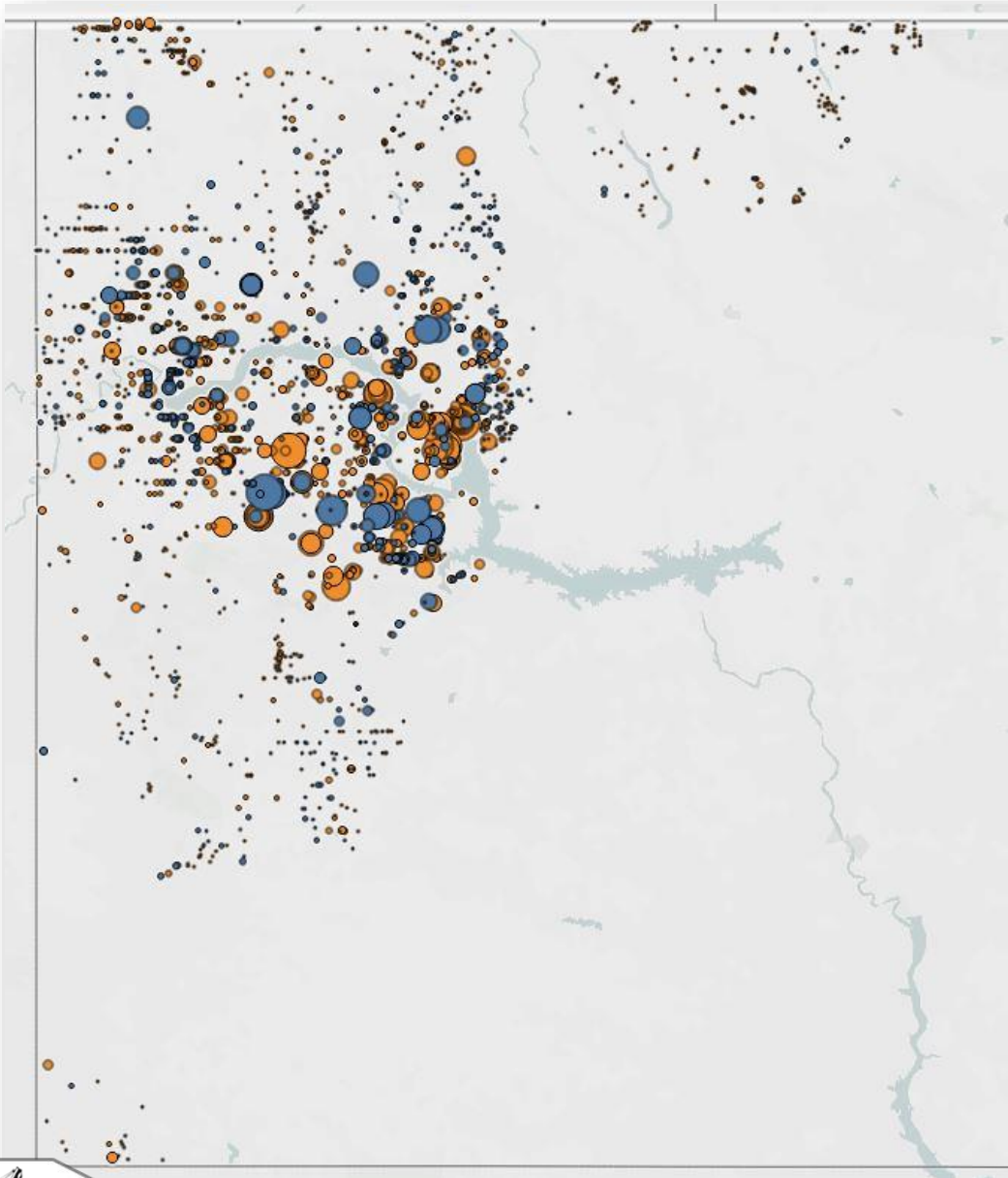
MONTH	ND	Eastern MT*	SD	TOTAL
January	1,430,521	57,396	3,091	1,491,007
February	1,503,591	55,354	3,070	1,562,015
March	1,429,501	57,677	2,946	1,490,124
April	1,221,019	49,014	2,610	1,272,643
May	859,362	36,983	2,466	898,811
June	890,109			
July				
August				
September				
October				
November				
December				



Monthly Production Change

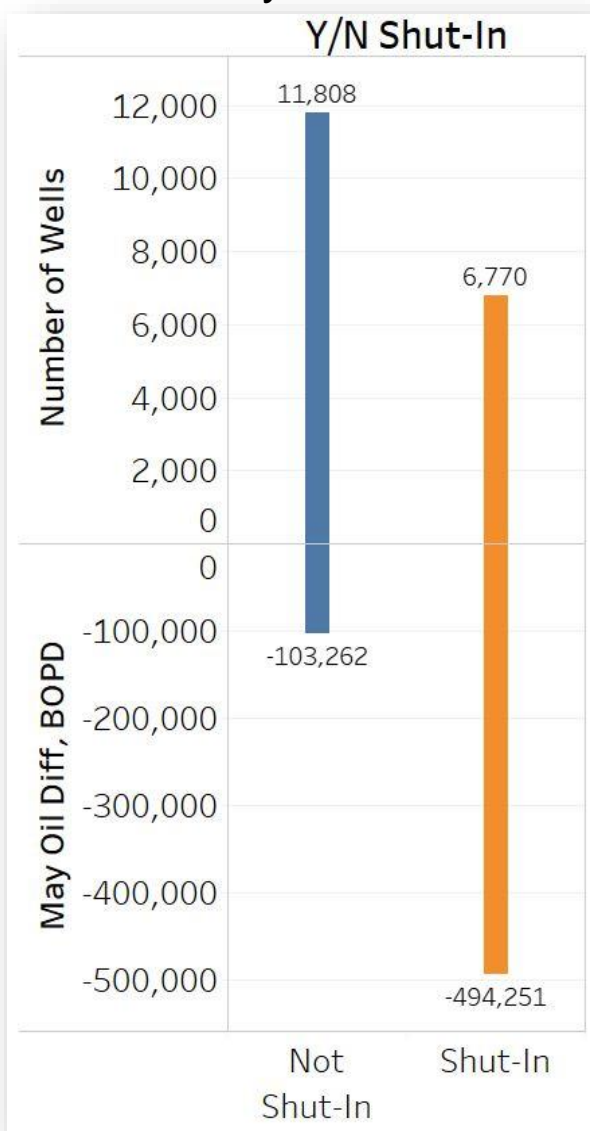


March to June 75+% M-O-M Oil Drop

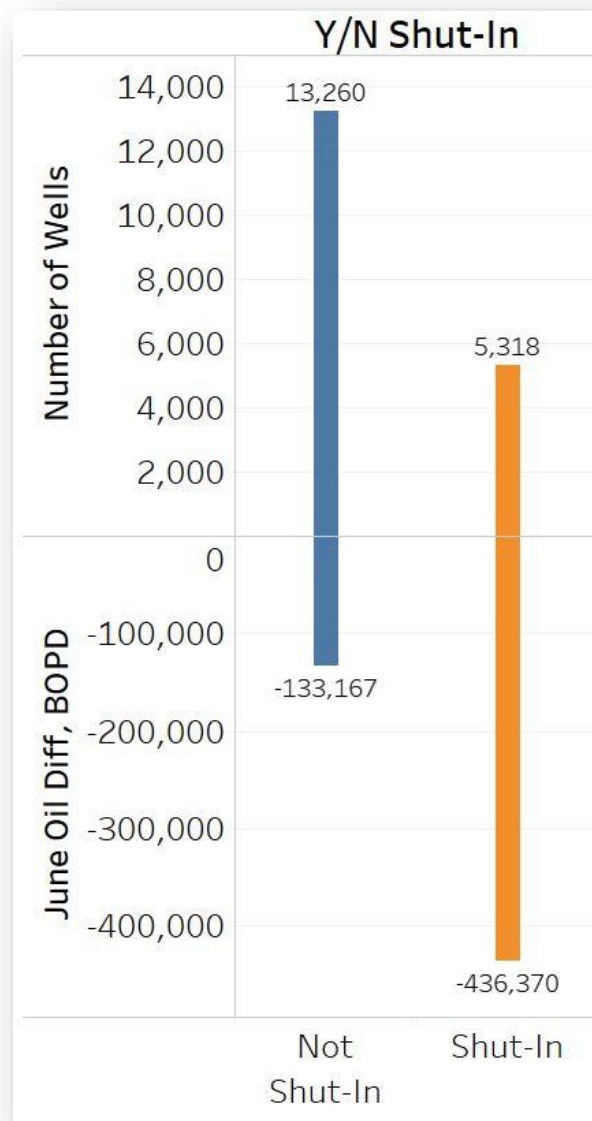


May & June Comparison

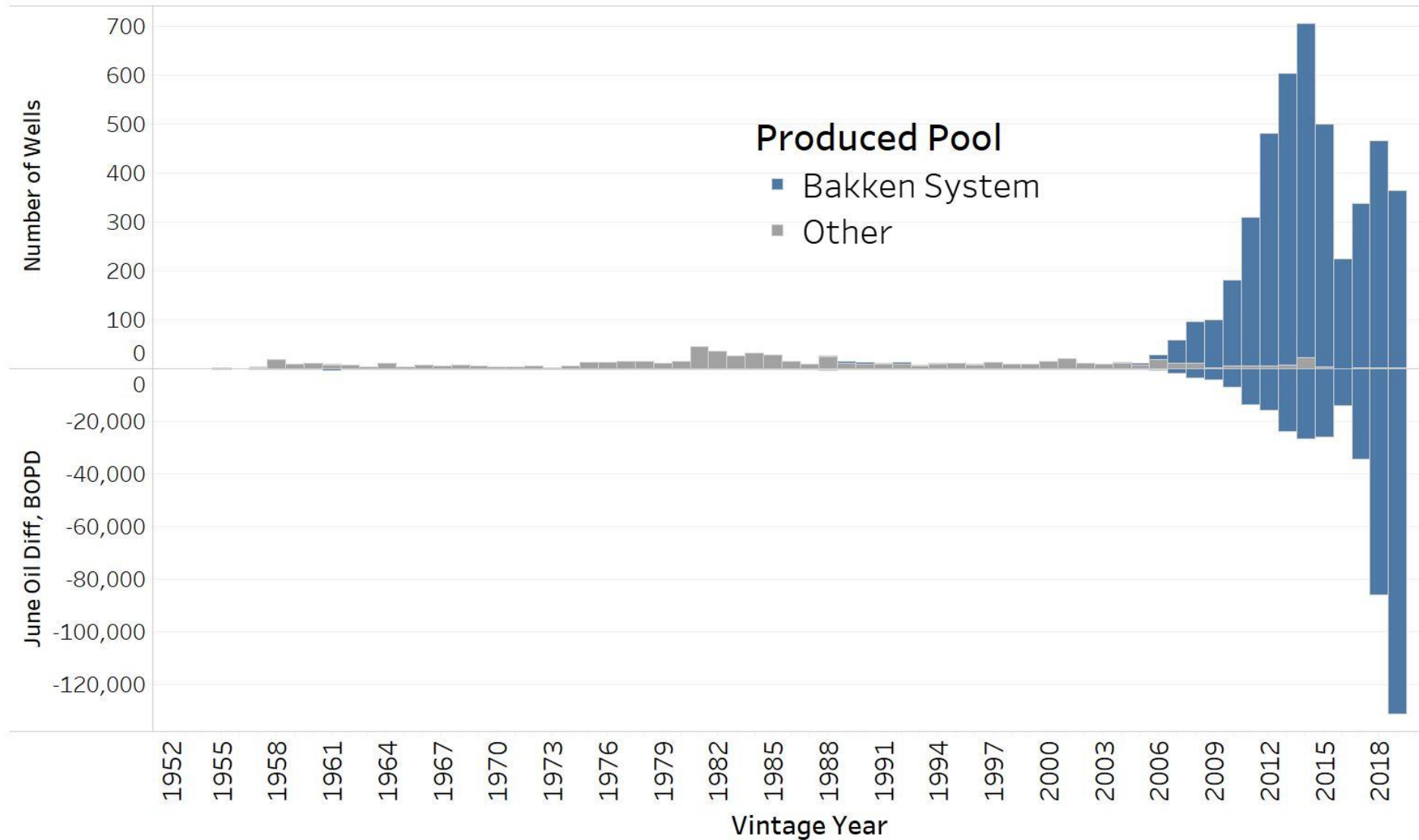
May 2020



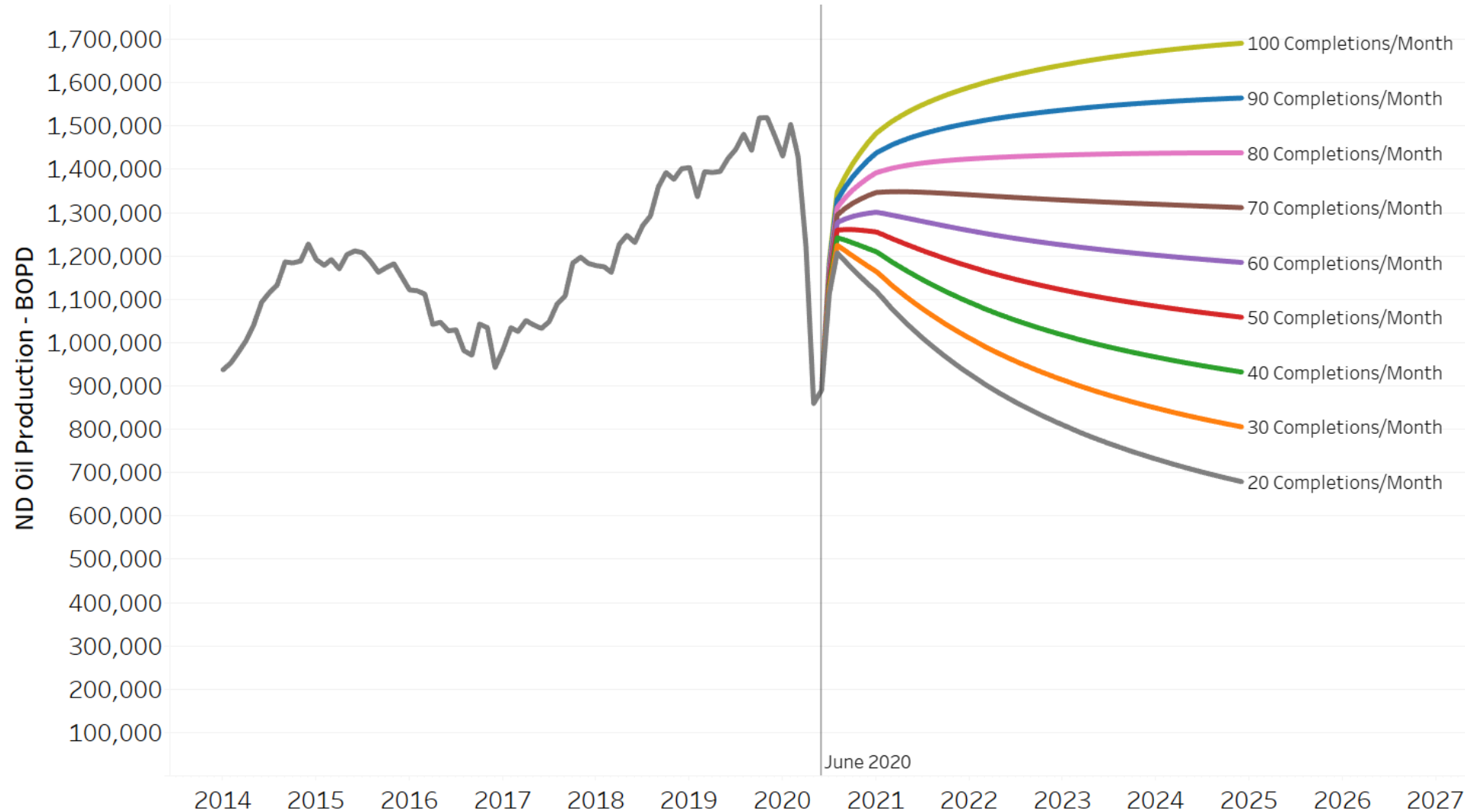
June 2020



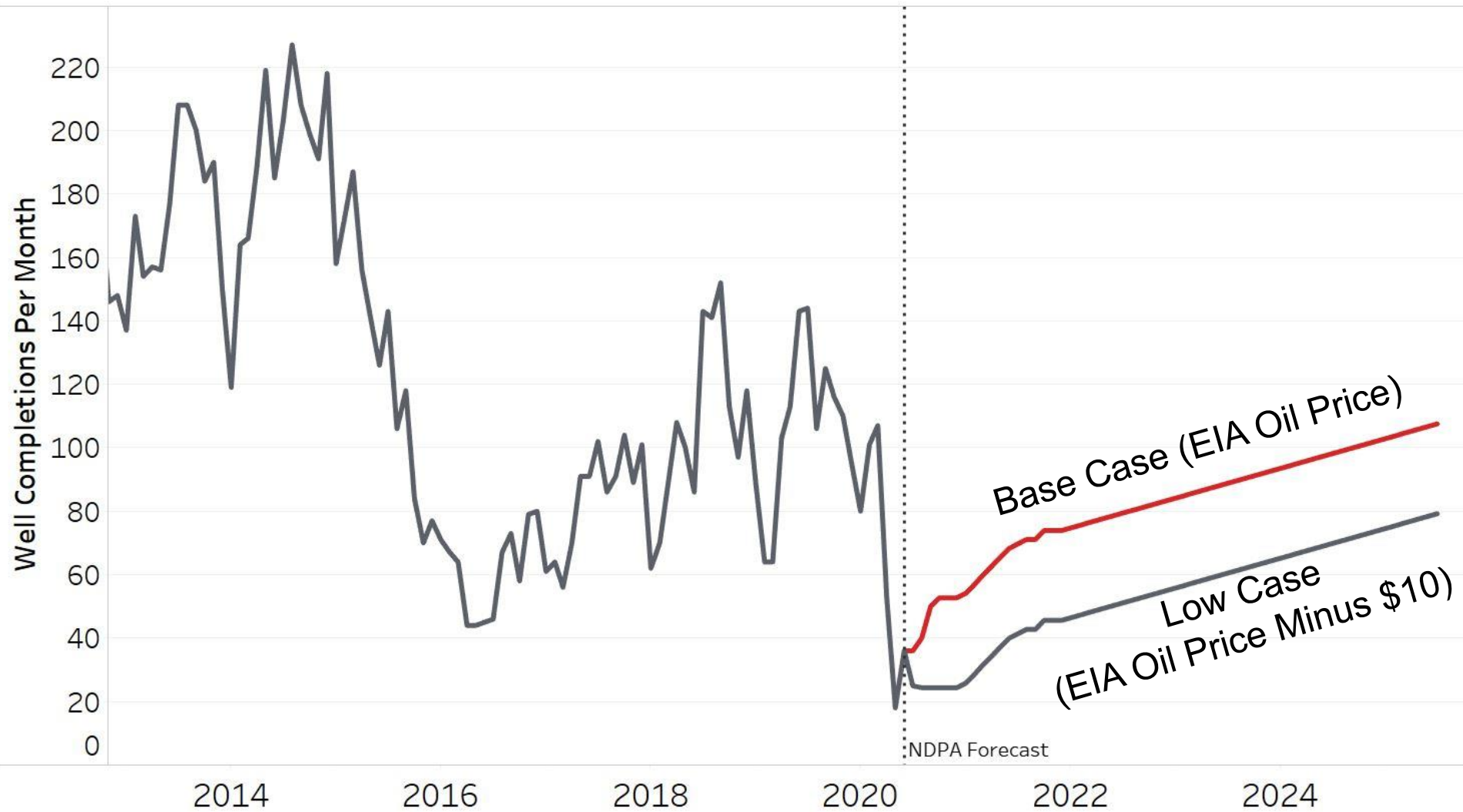
Vintage Year of Shut-In Wells – June 2020



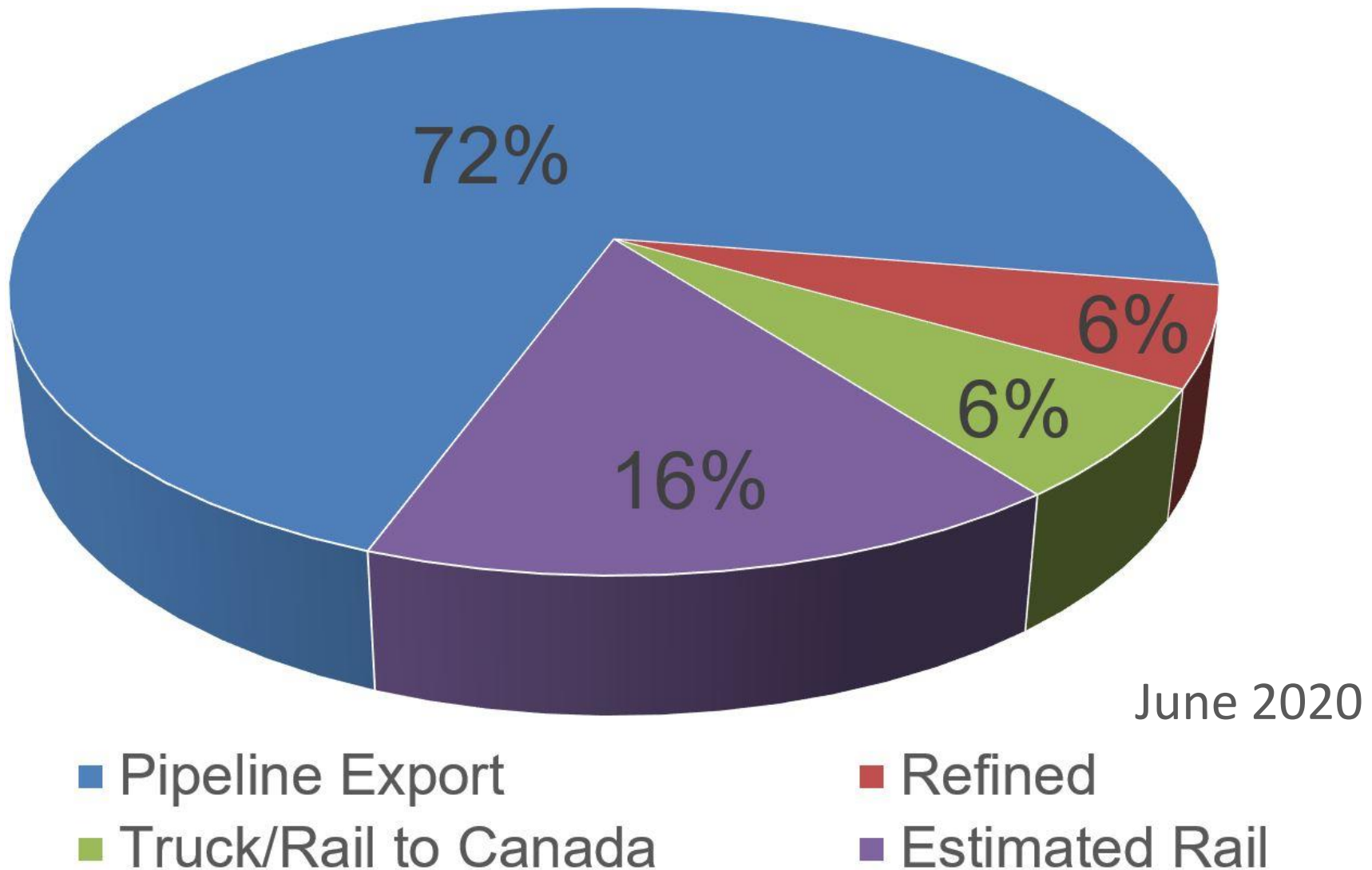
Monthly Completion Scenarios



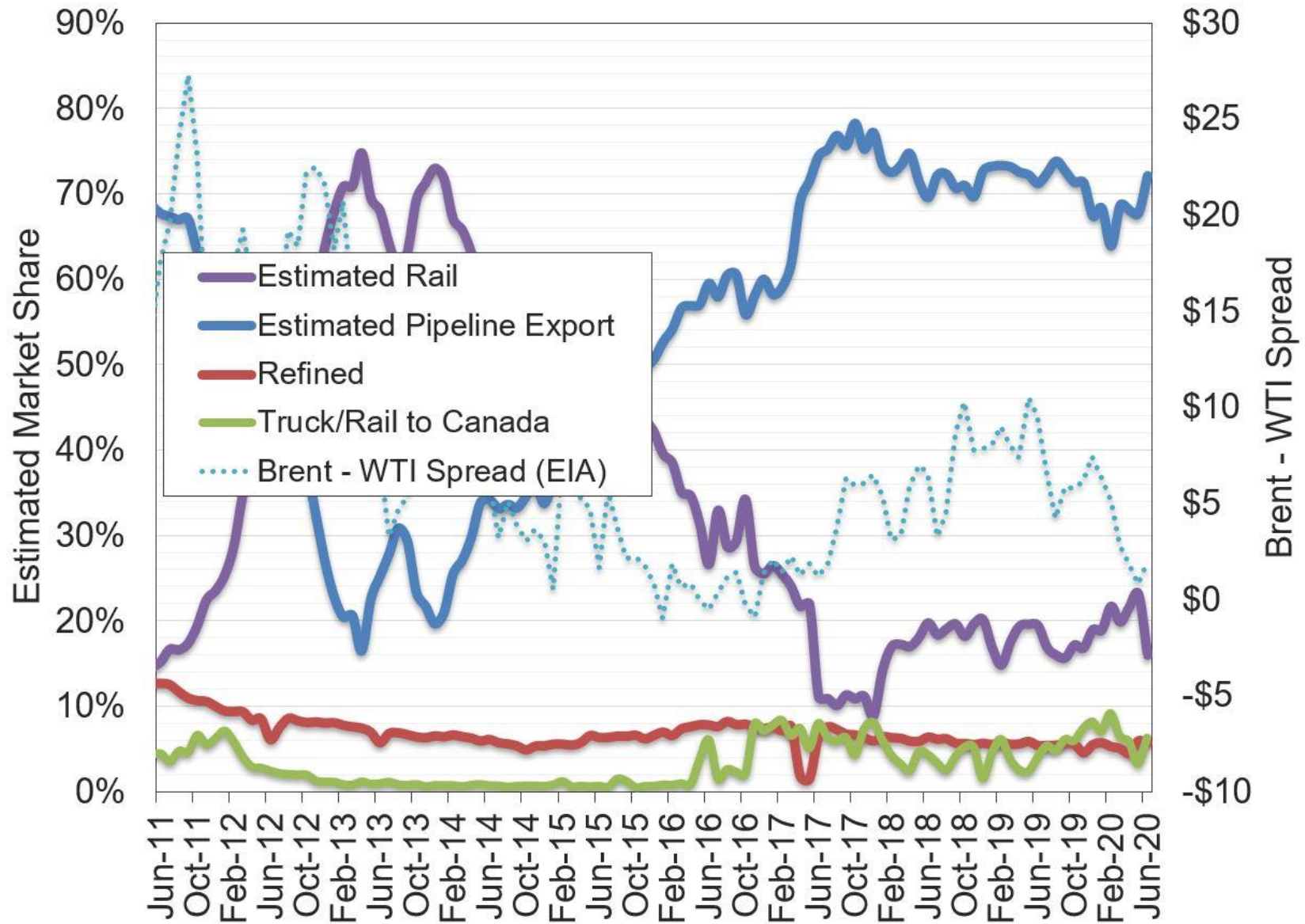
North Dakota Completions



Estimated Williston Basin Oil Transportation



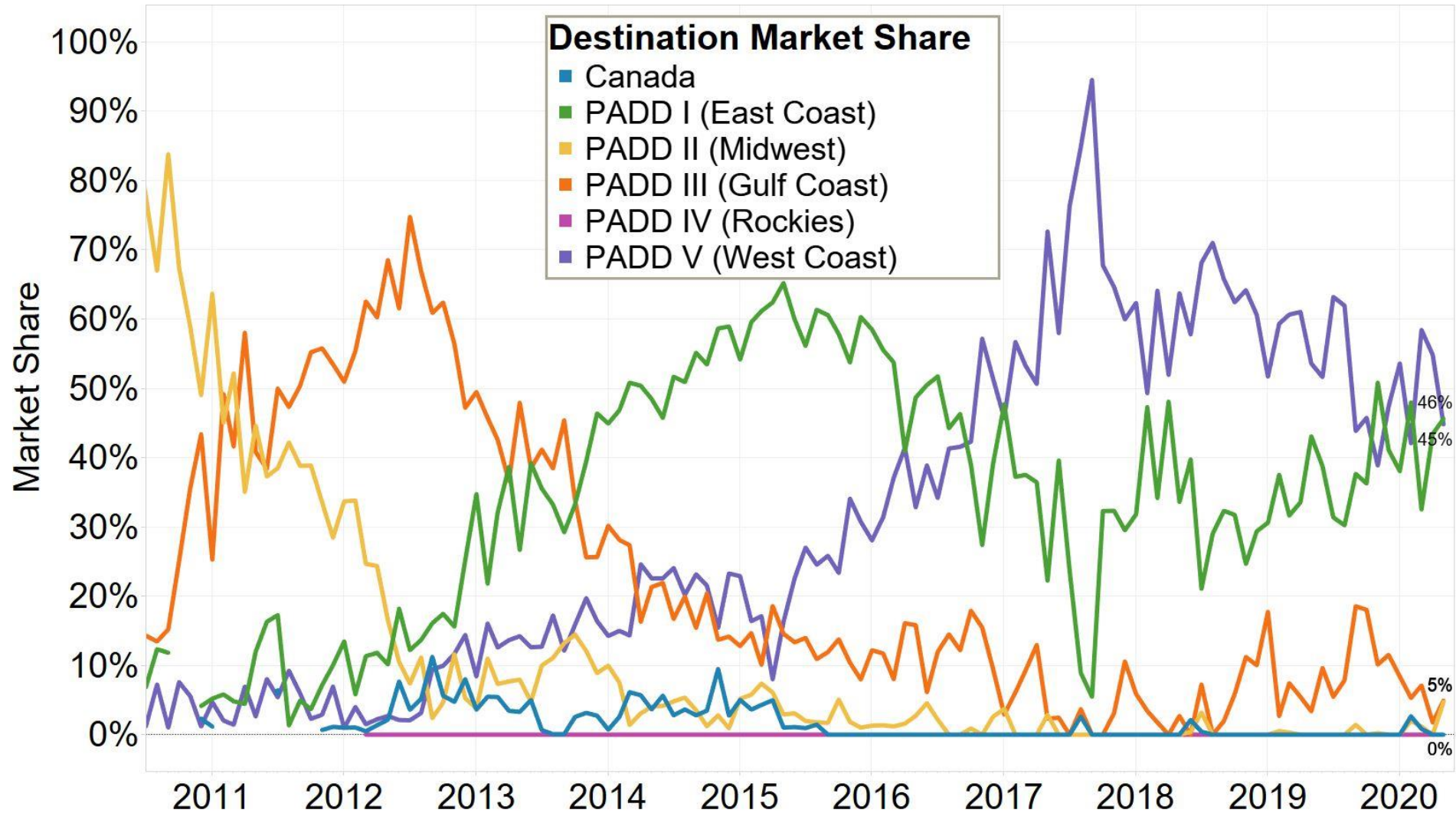
Estimated Williston Basin Oil Transportation



Estimated ND Rail Export Volumes



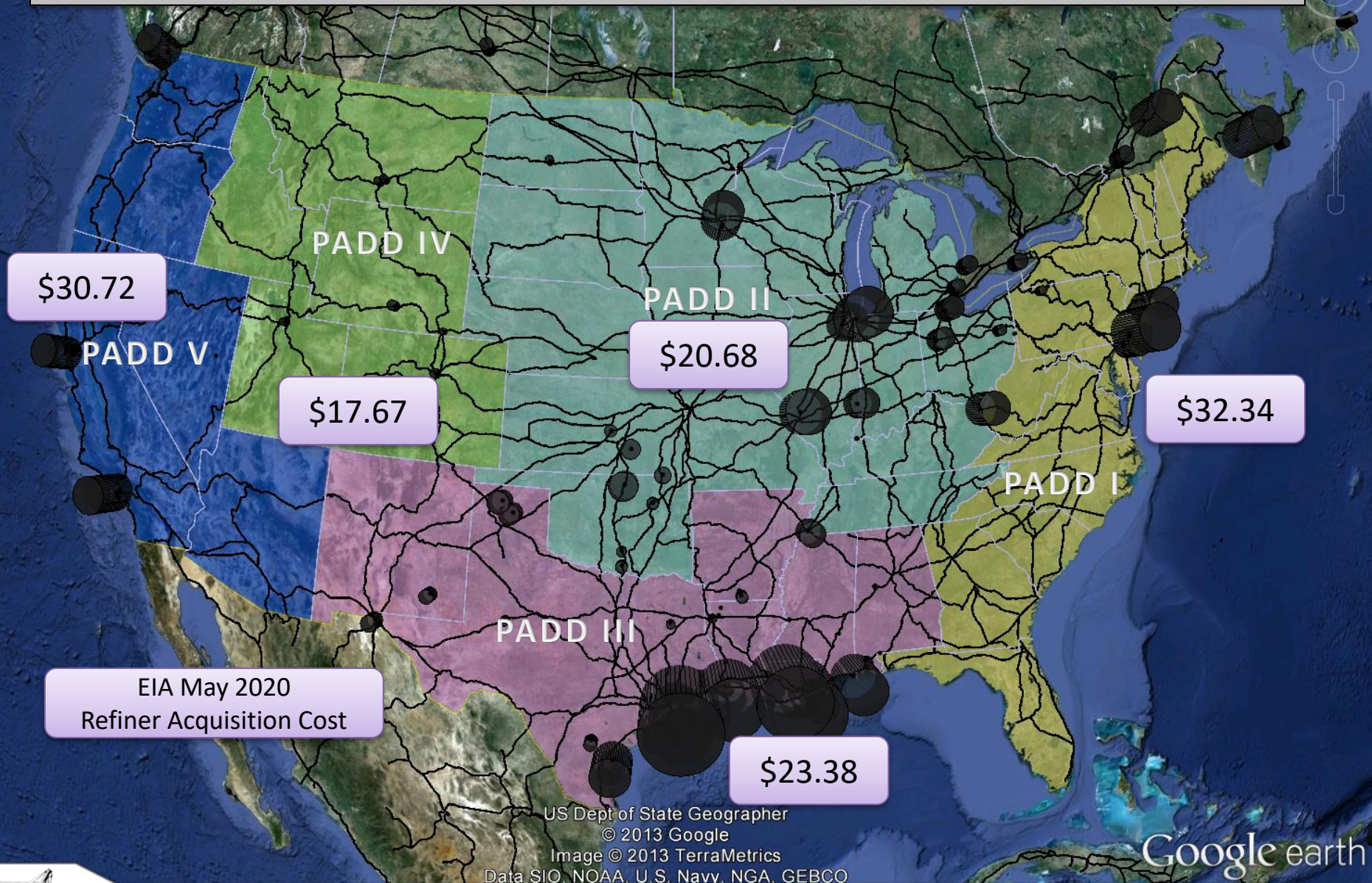
Rail Destinations Market Share (May 2020)



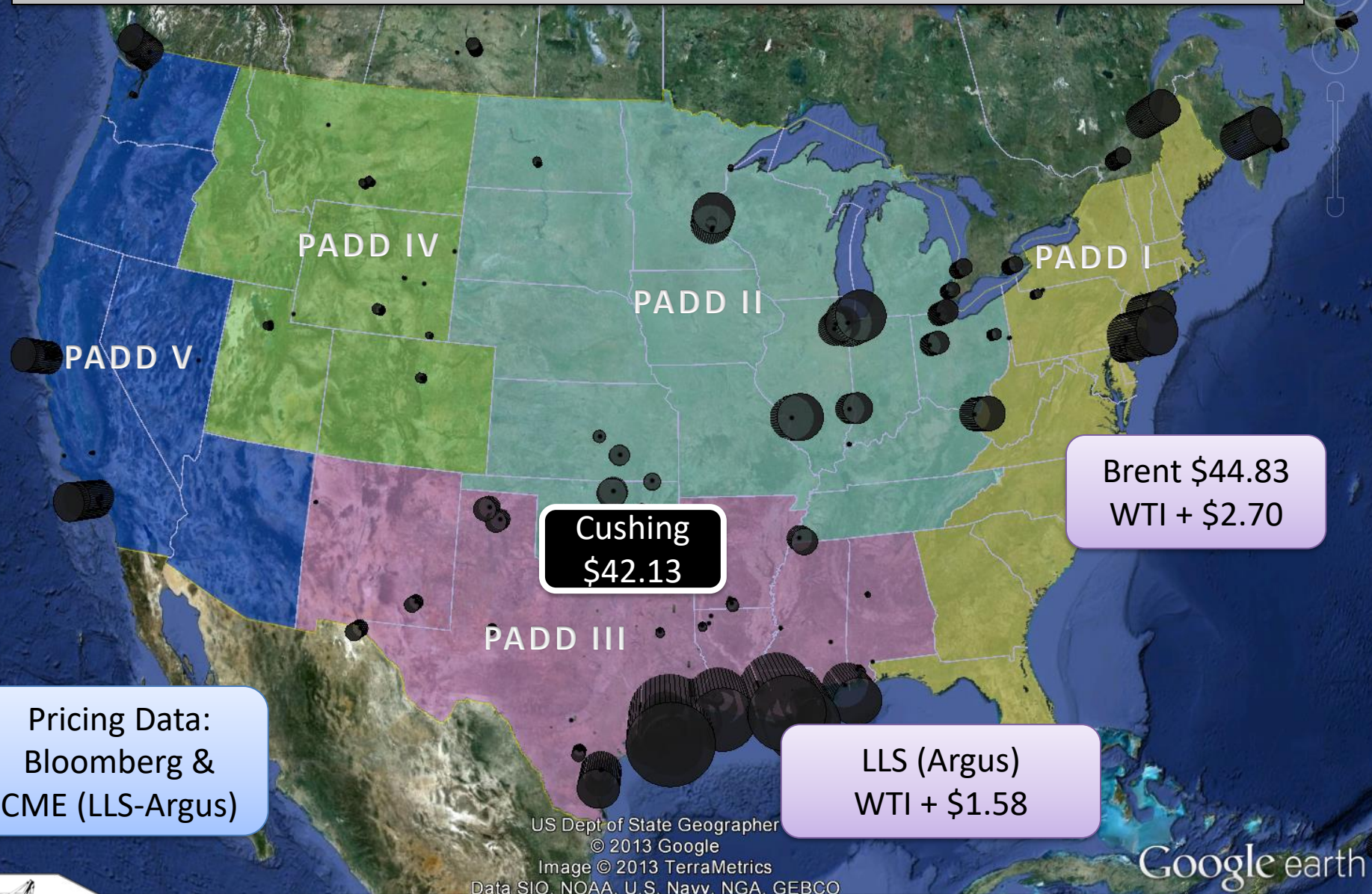
Data for Rail Destination Market Share Provided by the US Energy Information Administration



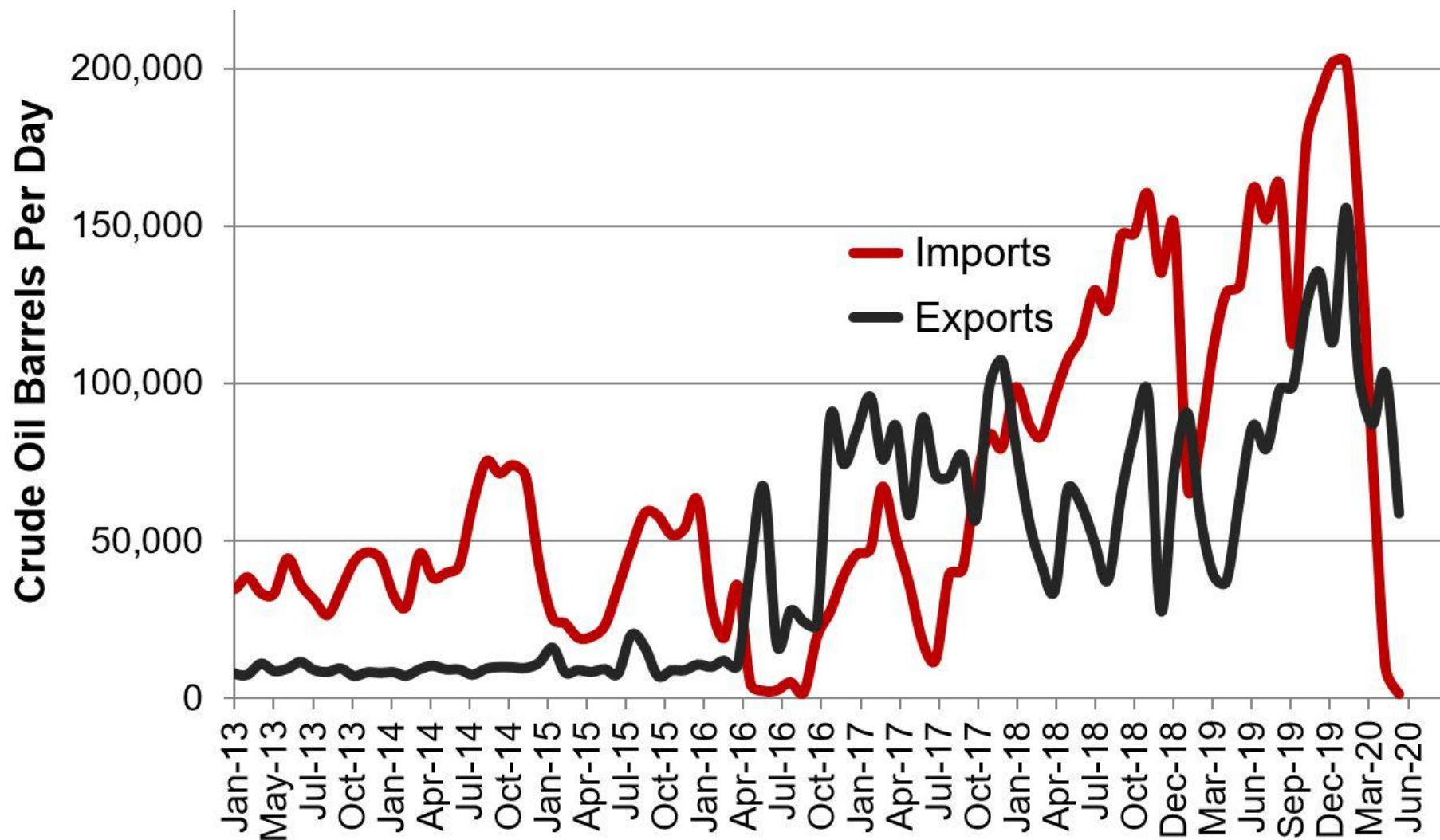
Major Rail Lines and Refineries



Crude Oil Prices – August 14, 2020



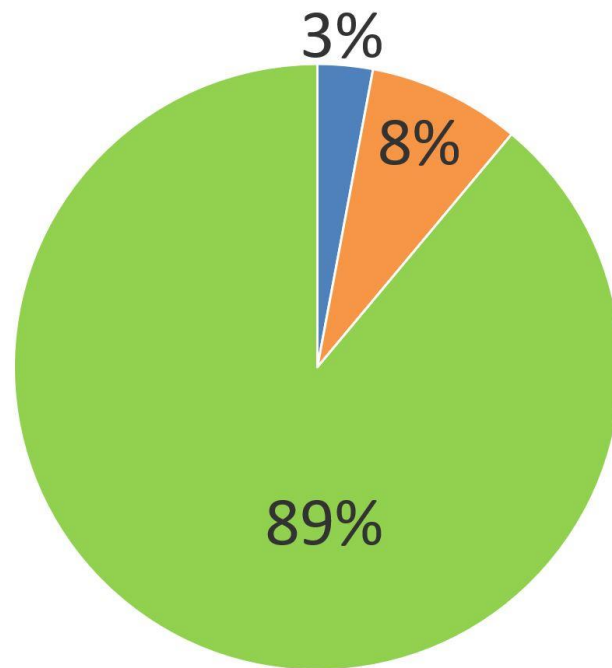
Williston Basin Truck/Rail Imports and Exports with Canada



Data for imports/exports chart is provided by the US International Trade Commission and represents traffic across US/Canada border in the Williston Basin area.



Solving the Flaring Challenge



Statewide

GREEN – % of gas captured and sold
Blue – % flared from zero sales wells
Orange – % flared from wells with at least one mcf sold.

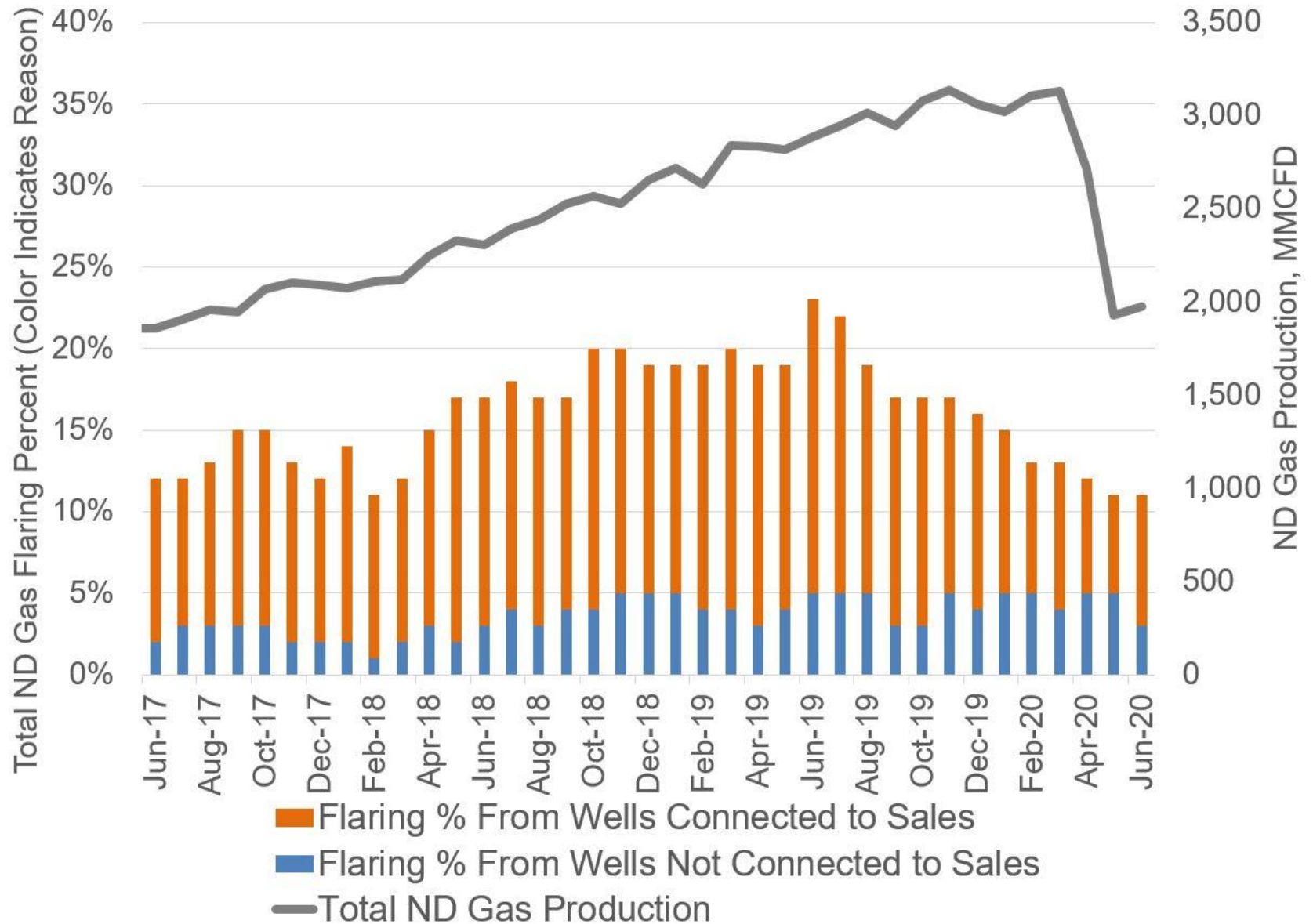
Simple Terms

Blue – Lack of pipelines
Orange – Challenges on existing infrastructure

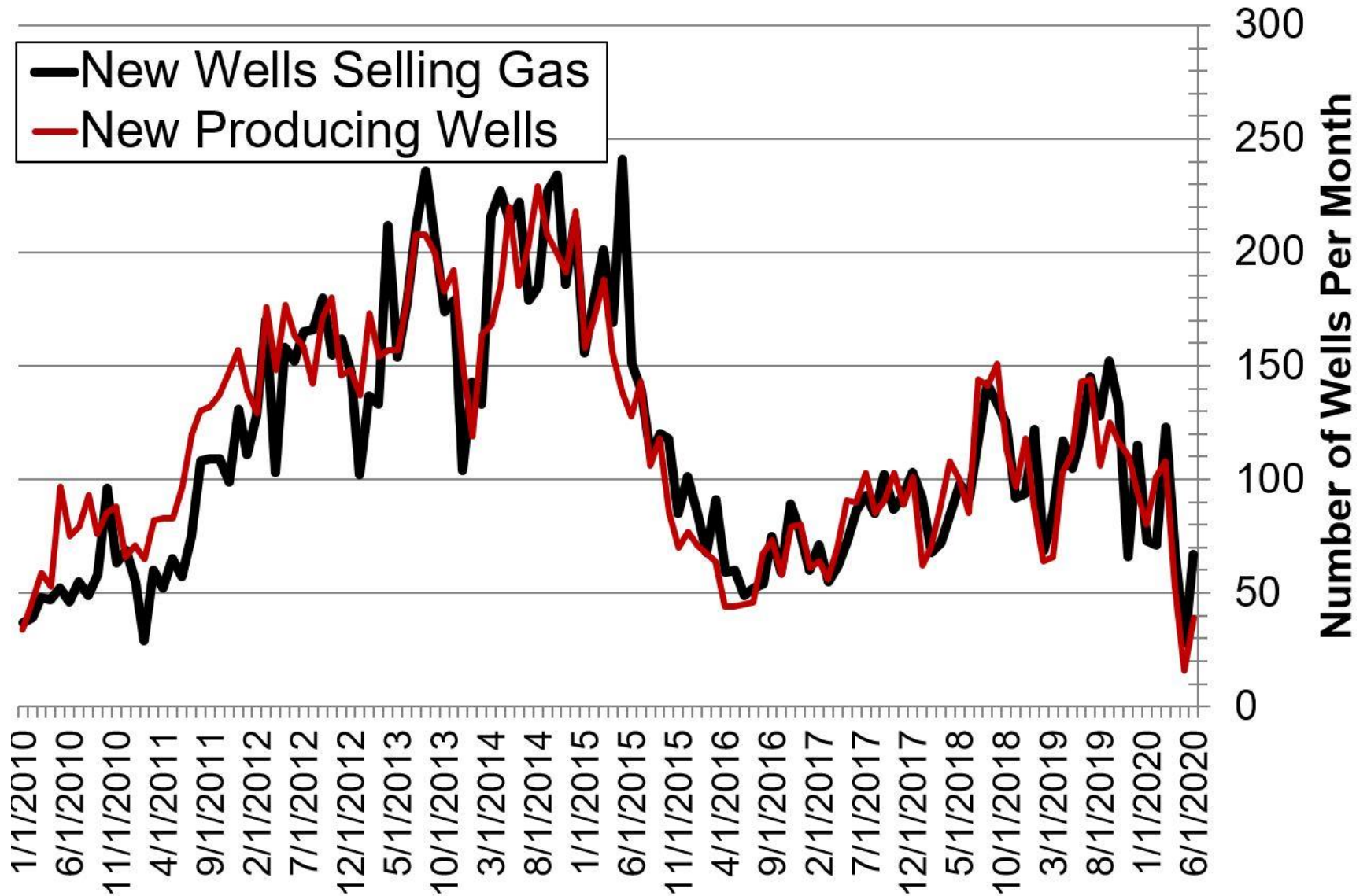
June 2020 Data – Non-Confidential Wells



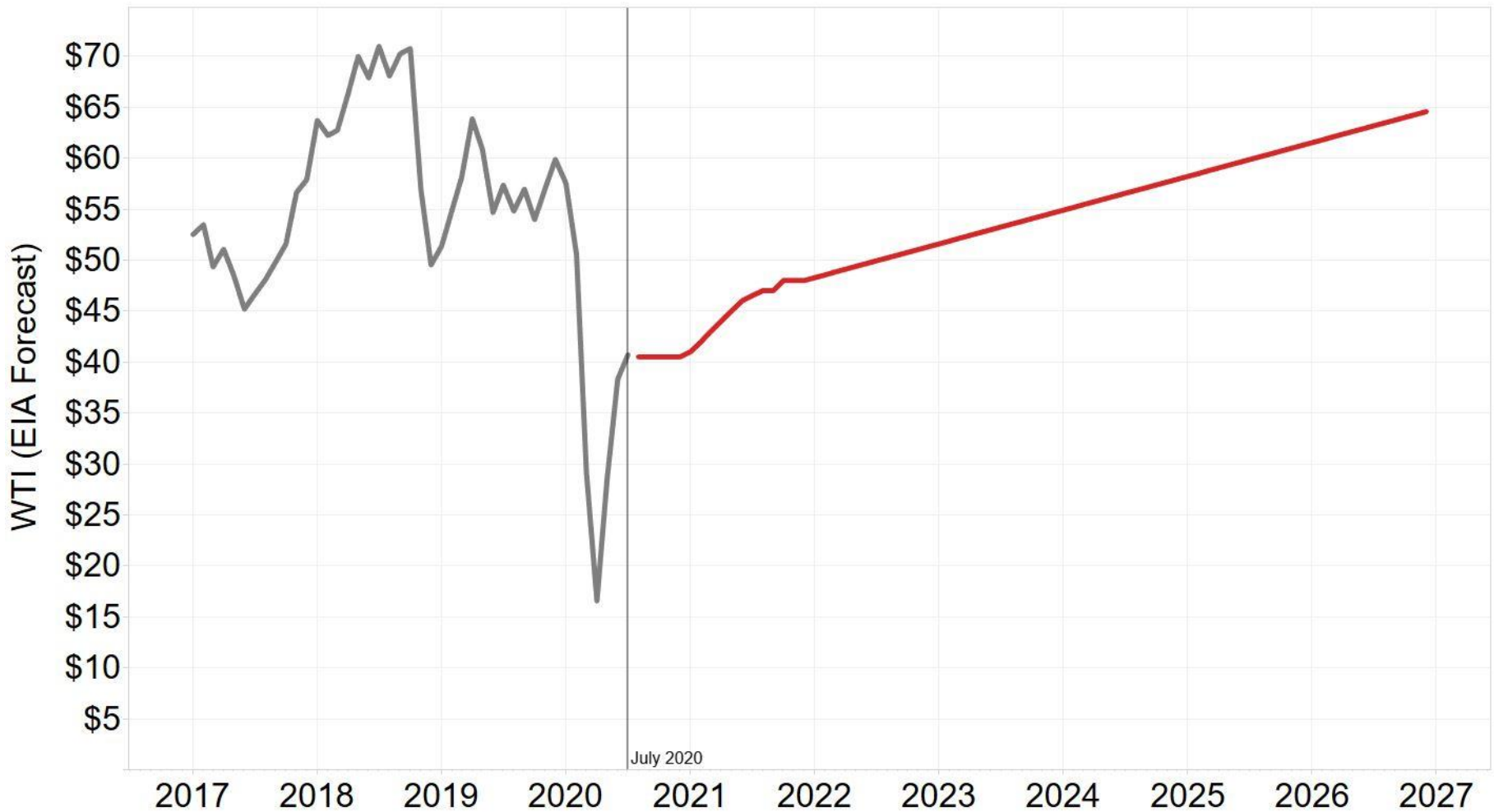
Solving the Flaring Challenge



Solving the Flaring Challenge



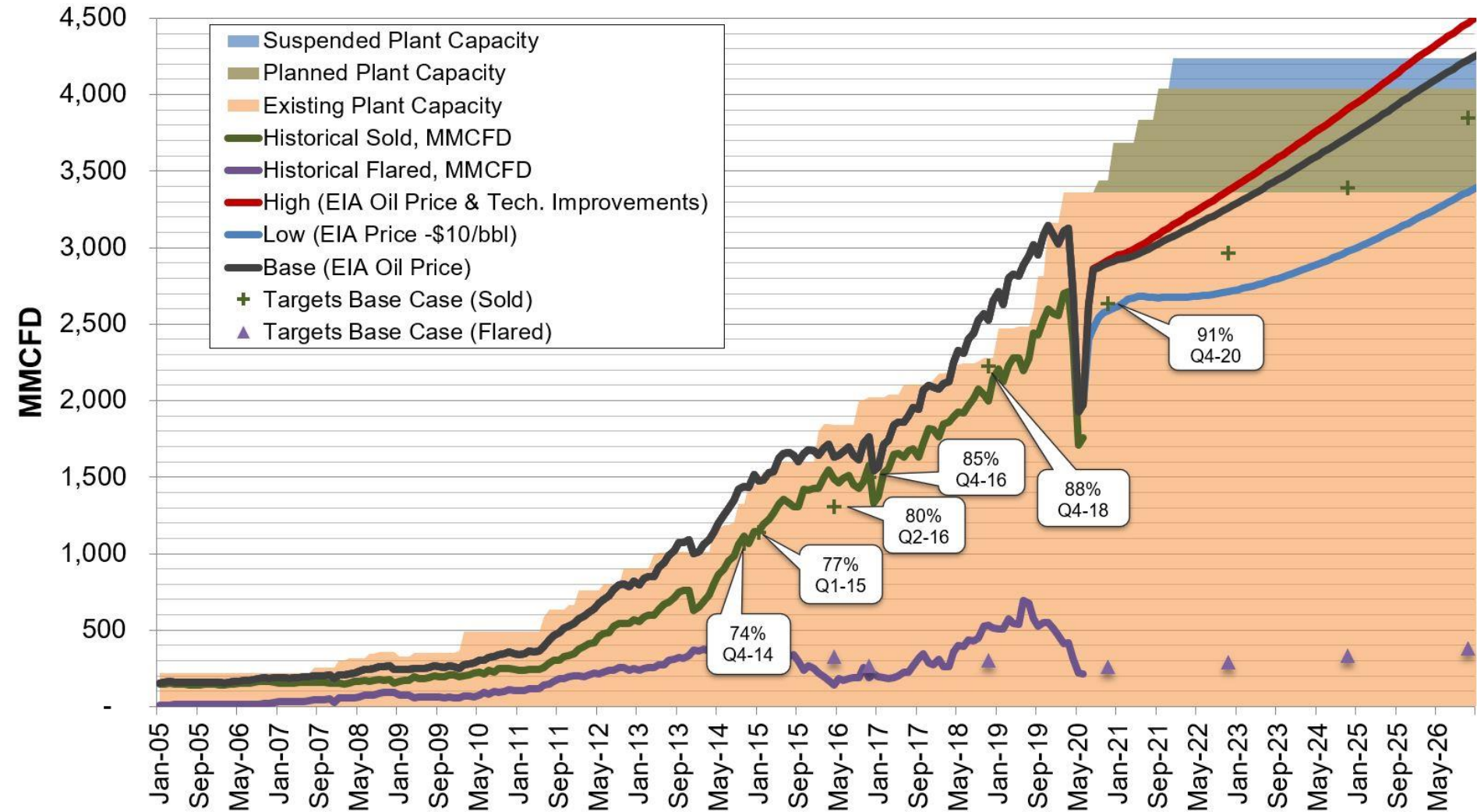
EIA Oil Price Forecast*



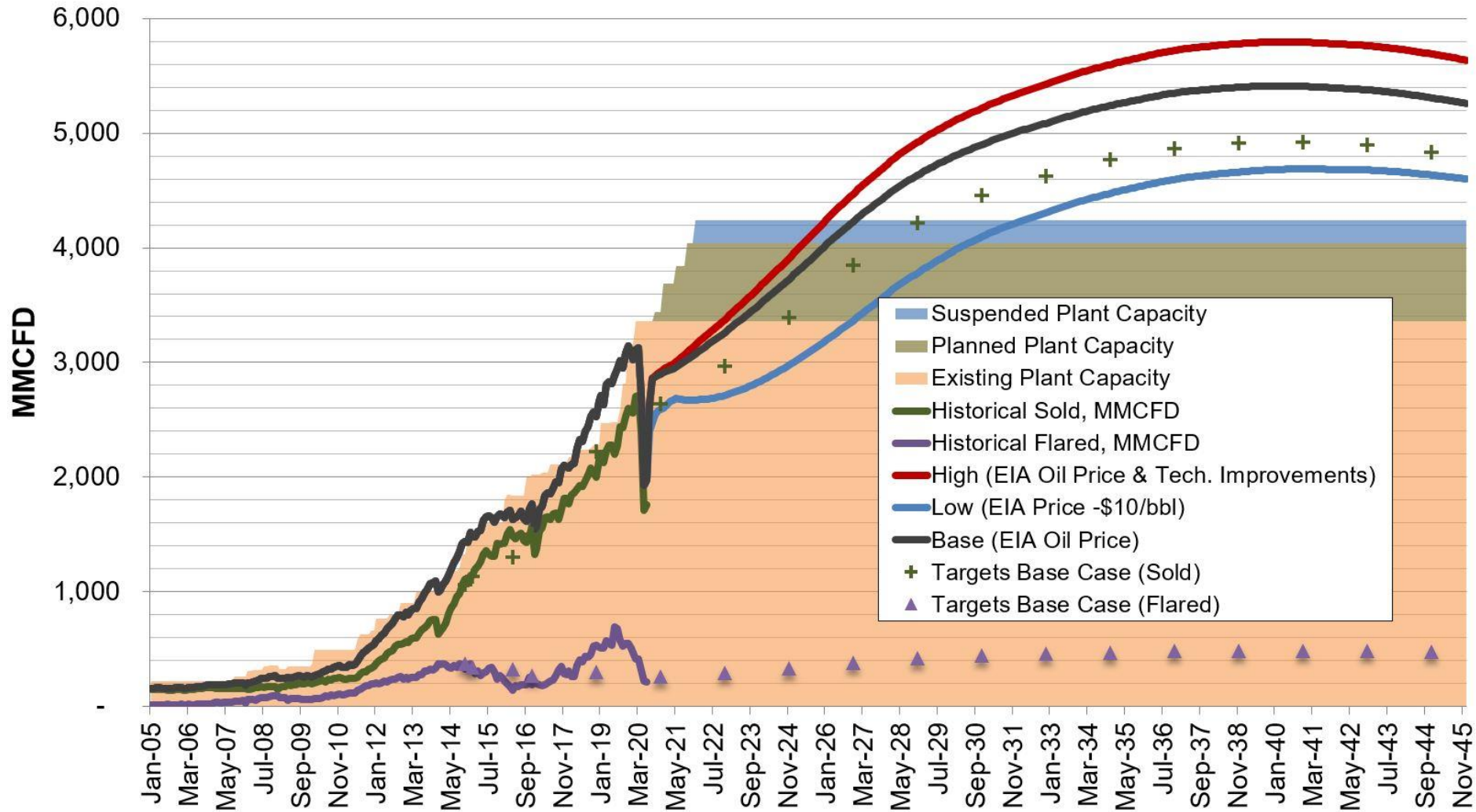
**EIA August 2020 SEO and January 2020 AEO Blend*



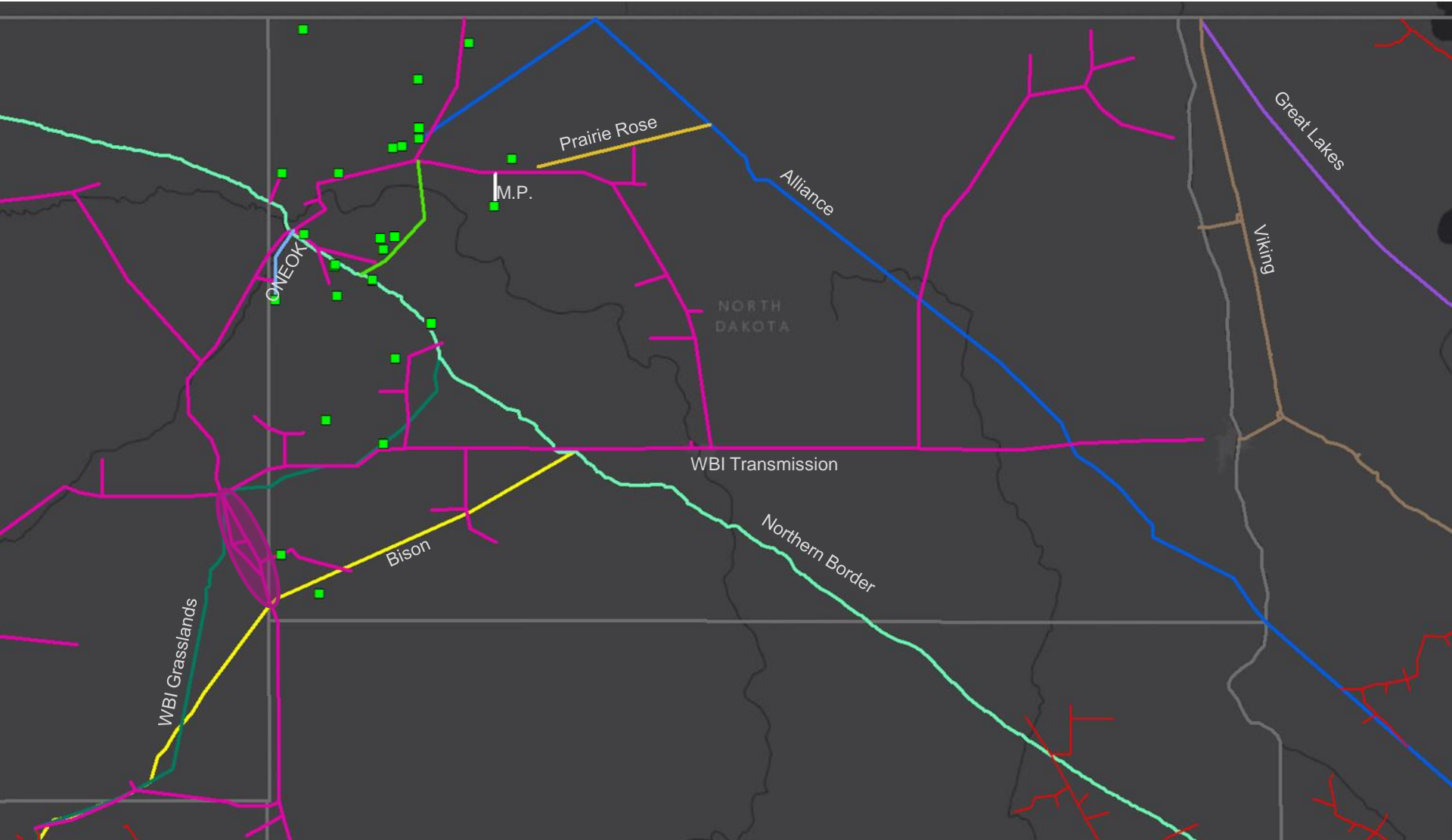
Solving the Flaring Challenge



Solving the Flaring Challenge



Major Gas Pipeline and Processing Infrastructure



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